SmartCare Data Migration

This resource offers information and guidance to providers about the plans for data migration from the legacy systems into SmartCare. **Note: The planned data migration table on page 2 includes updated dates and information relevant to go-live. Providers should expect an email from BHS immediately before go-live with final confirmation of data migration dates and details.**

Data Migration Into SmartCare

Minimal demographic information on clients currently in CCBH or SanWITS will be migrated into SmartCare for go-live. The goal is to ensure providers can find a client in SmartCare and know based on the information available whether they need to go to the legacy system for additional information. This will occur in the following ways:

- Migration Directly From SanWITS: Minimal demographic information on all clients since 2018 and most other older clients.
- Migration Directly From CCBH: Minimal demographic information on all clients (including Insyst), plus open authorizations and scheduled appointments.

Additionally, for CCBH PDFs will be available for data that cannot be directly migrated into SmartCare. These include:

- All Medications, Diagnoses, and Allergies active within the past two years for both open and closed clients.
- Clinical documentation within the past two years, including the most recent:
  - Discharge Summary
  - Behavioral Health Assessment (BHA) (Adult and Children)
  - Mobile Crisis Assessment
  - Crisis Stabilization Unit (CSU) Episode Summary
  - Problem List
  - Psychiatric Assessment
  - Progress Notes

Required Data Re-Entry In SmartCare

- **Some data cannot migrate to SmartCare and will need to be entered at go-live for clients.** This is primarily due to compatibility of the legacy systems with SmartCare - data sets cannot be directly matched. **Data that will need to be entered for all clients include medications, allergies, and problem lists.**
- **Review of diagnoses will be necessary.** Diagnoses in SmartCare are stored at the program level versus at the client level, so diagnoses migrated from CCBH and SanWITS into SmartCare are only available within the program. **This means that providers may not have access to information that was historically in CCBH or SanWITS, and active diagnoses may need to be re-entered in SmartCare.**
- **The data delta, or gap between data migration and go-live, has been decreased. Please see the table on page 2 summarizing planned dates and data migration details as of August 21, 2024.**

For more information information or questions, contact QIMatters.HHSA@sdcounty.ca.gov.

For more information, go to OptumSanDiego.com and click on the SmartCare tab under MHP Provider Documents for the MH SOC; or DMC-ODS for the SUD SOC.

SmartCare Data Migration

The table below summarizes the currently planned data migration details as of August 21, 2024.

Data Type & System of Origin	Location in SmartCare	Data Delta (Gap)	What This Means
Demographic and active diagnosis data for all CCBH clients, including Insyst clients. Includes CCBH client ID, open authorizations and scheduled appointments.	Into these same fields/screens inside of SmartCare	Data pulling through August 25 at 2:00 PM	These data fields, if entered after this date, will not be migrated into SmartCare. **Dual data entry will likely be needed for data entered into CCBH after this date** for clients still open to your program September 1.
Essential SanWITS demographic and active diagnosis information on all clients since 2018, and most other older clients.	Into these same fields/screens inside of SmartCare	Data pulling through August 25 at 2PM	These data fields, if entered after this date, will not be migrated into SmartCare. **Dual data entry will likely be needed for data entered into SanWITS after this date** for clients still open to your program on September 1.
CCBH medications and allergies, and inactive diagnoses. Data from past two years.	Into SmartCare 'Clinical Care Document' PDF folder	Data pulling through August 18.	This PDF is available to lessen the need for staff to move back and forth between SmartCare and CCBH at go-live. However, **active medications and allergies still need to be entered into the appropriate screens in SmartCare.**
Most recent CCBH documents below (if <two years): • Discharge Summary • BHA Adult/Children • Problem List • Mobile Crisis Assessment • CSU Episode Summary • Psychiatric Assessment • Progress Notes (PNs)	Into SmartCare PDF Folder	Data pulling through July 31	These PDFs are available to lessen the need for staff to move back and forth between SmartCare and CCBH at go-live. While there is not an expectation that you re-enter assessments or PNs in SmartCare, **there may be a clinical need to review CCBH assessments and PNs entered in August. Problem lists must be reentered.**
Most critical demographic data (client info and assignment or episode) for new CCBH and SanWITS clients	Into these same fields/screens inside of SmartCare	**Data pulling through August 30 at 4:00 PM**	**The project team will attempt to manually enter clients created in the legacy systems after this time and before go-live** to 1) match CCBH client ID to and include SanWITS client IDs in client records in SmartCare and 2) lessen administrative burden to programs. **Please look for a communication from the project team before you add any new clients!**

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